



File Tracking System

A Project of DMD

DMD / M / 01

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1.0 INTRODUCTION

1.1 File Tracking System:

File Tracking System offers clear visibility of the file movement throughout the file approval process. There is no additional client application or software required to be installed as the system is integrated with Lotus Email system.

This document is a guide for the users who will use the File Training System. The following are the functionalities of the system commonly available for all users:

- a. Login**
- b. Create File Record**
- c. Reports**
 - i. Basic Info**
 - ii. By Initiator**
 - iii. By At Desk**
 - iv. By Date**
 - v. By Department**
 - vi. Closed File**
- d. Sign out (Exit)**

1.2 Why File Tracking System:

Our existing file processing tracking system is inefficient and it is very difficult to track any file status and place where it is stopped. This new system will help to track not only the place of file but also number of days spent on one desk to another.

1.3 Basic Assumptions:

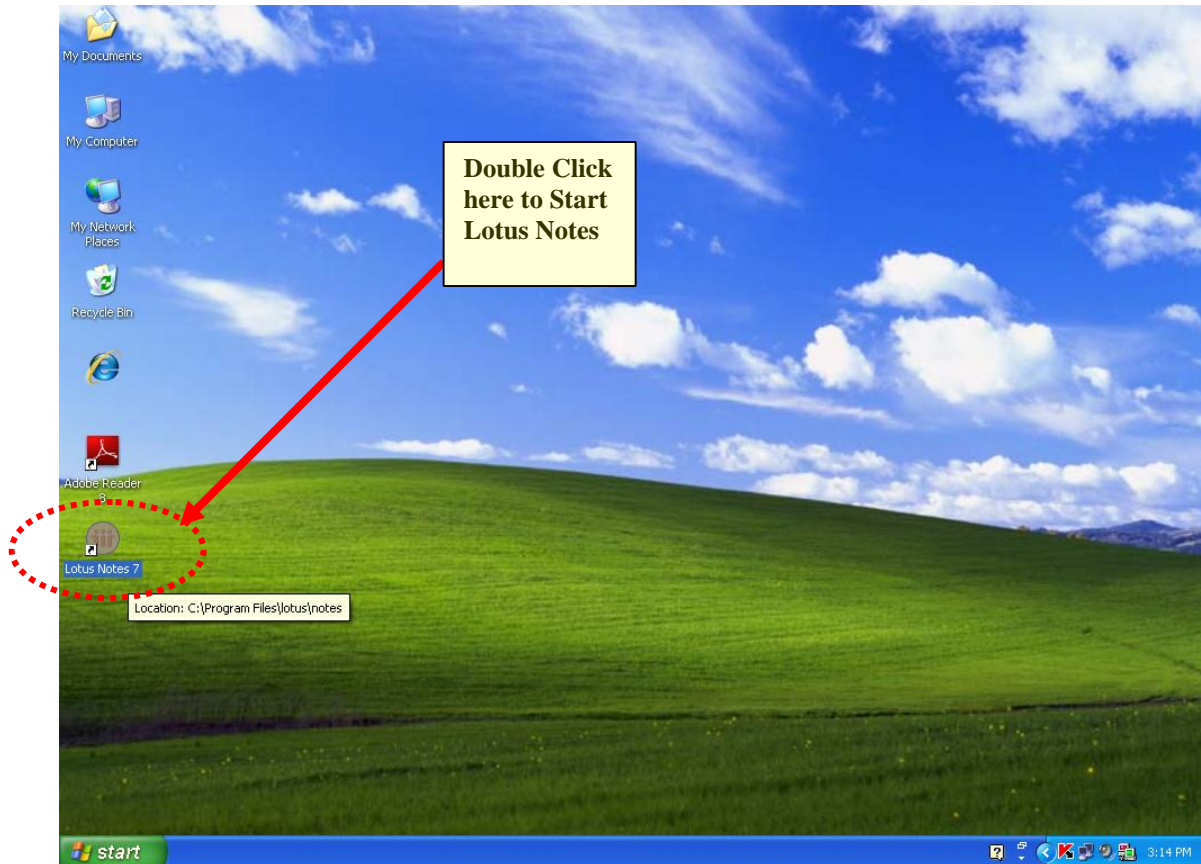
Following are the assumptions which must be understand clearly before working on File Tracking system

- File Tracking System deals only with electronic movement of file from one desk to another.
- Physical file must be sent to next authority simultaneously in order to track file on real time.
- System will not show the correct status of file if entry does not make on any desk.

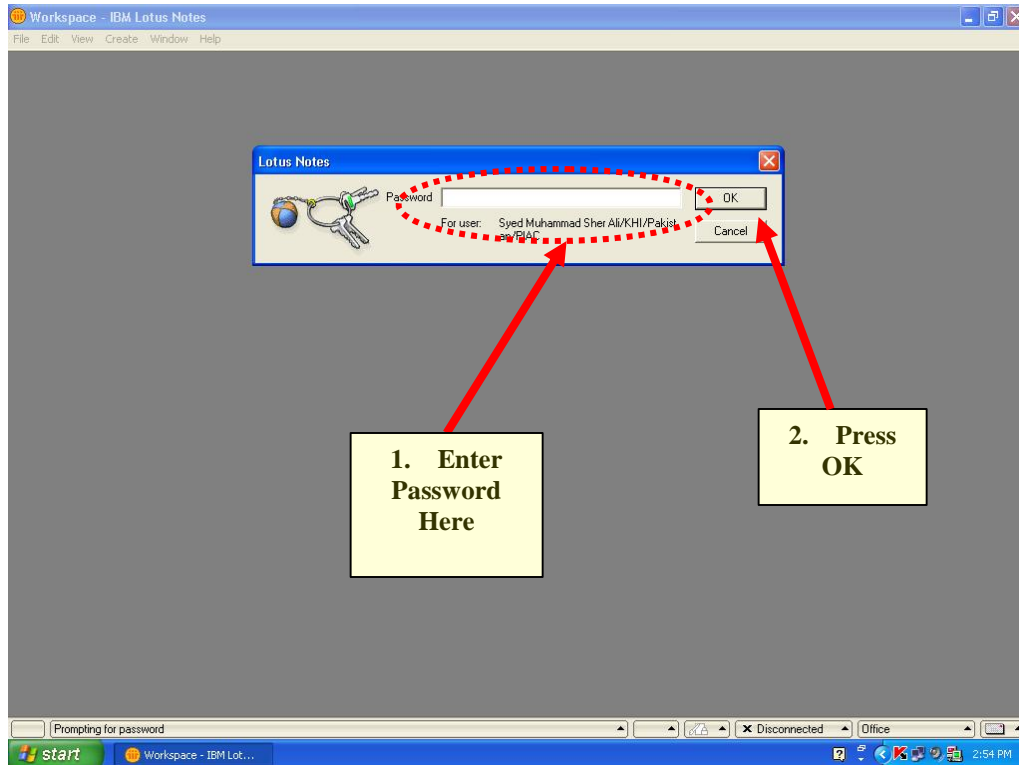
2.0 Lotus Notes Client

2.1 Logging on Lotus Notes:

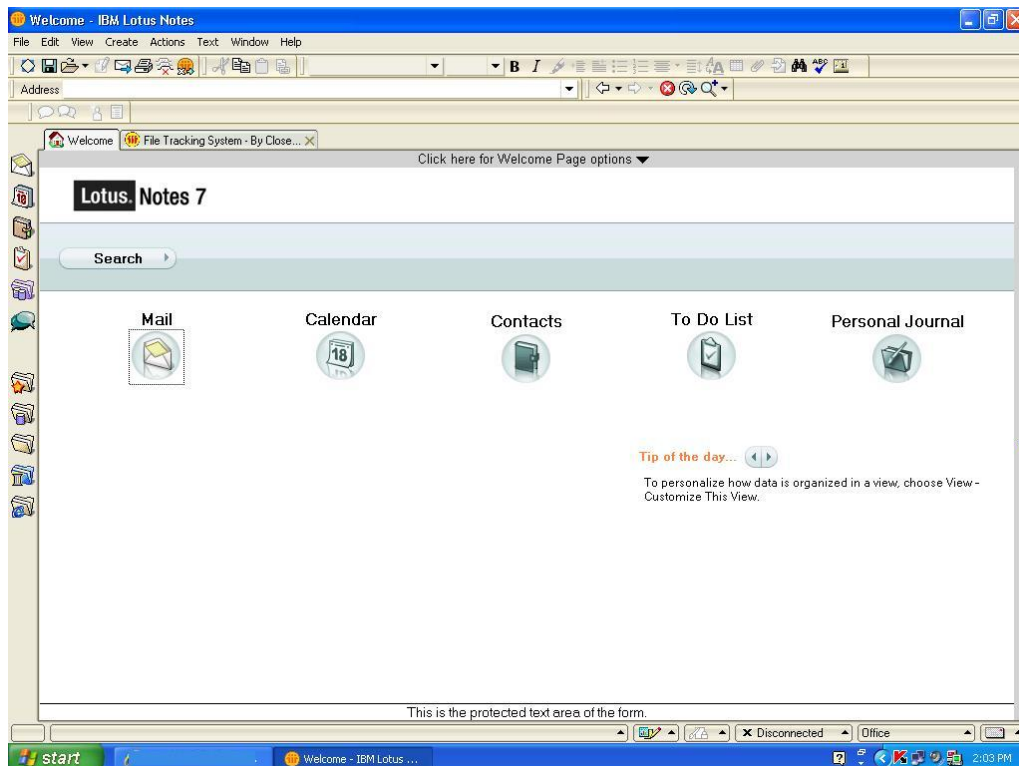
File Tracking System is accessible to all users on the network by logging on to Lotus Notes Client.



User will have to enter password on next screen to access the File Tracking System.



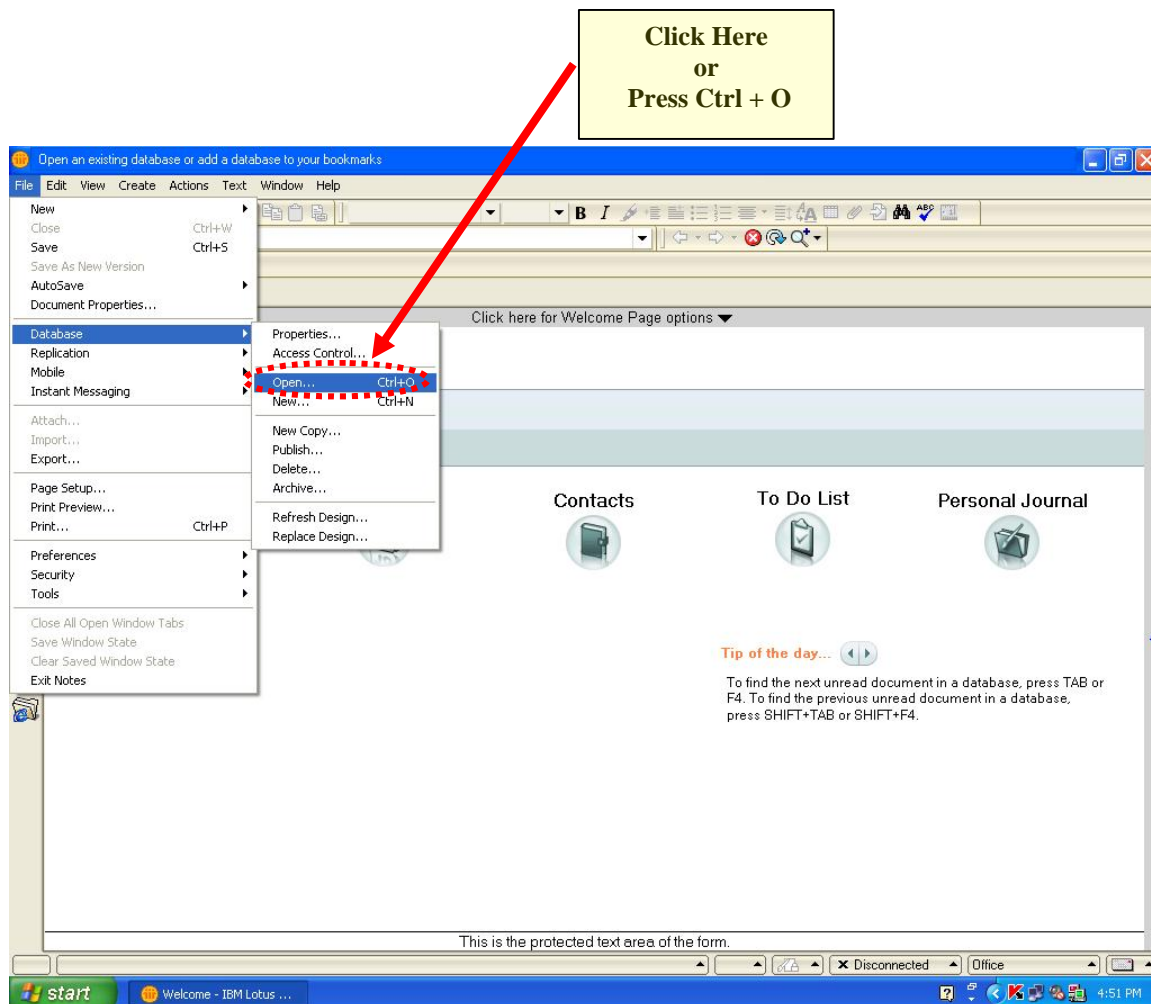
On Login next screen will appear which shows the main screen of Lotus Notes



2.2 Logging on File Tracking System:

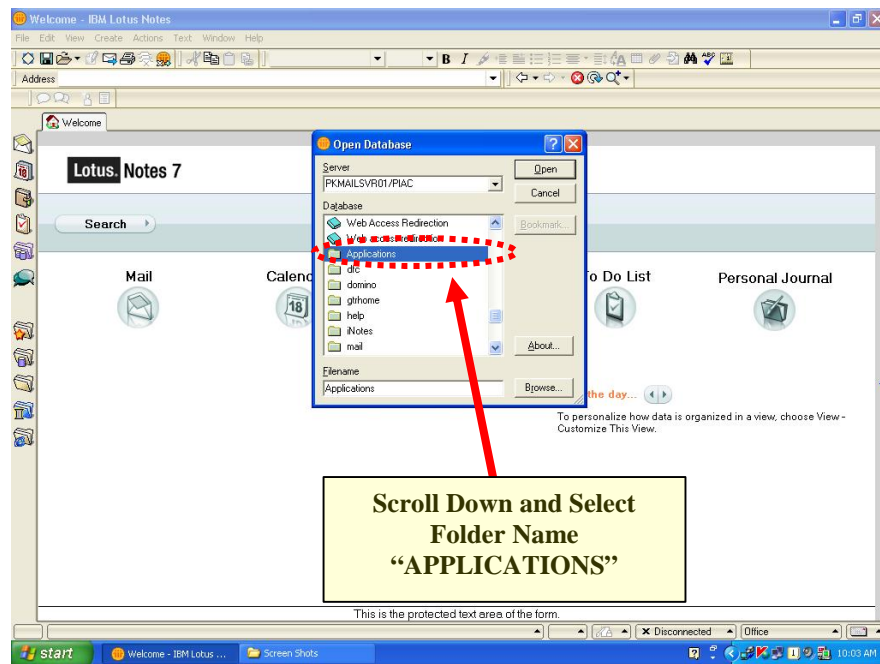
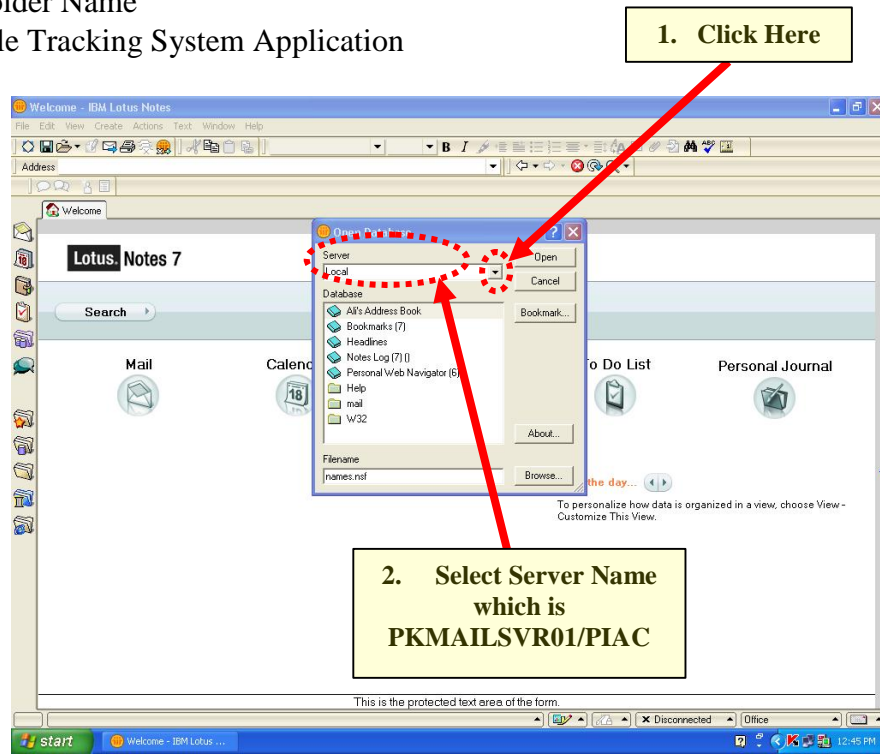
On Main Screen User will go on File Menu → Database → Open

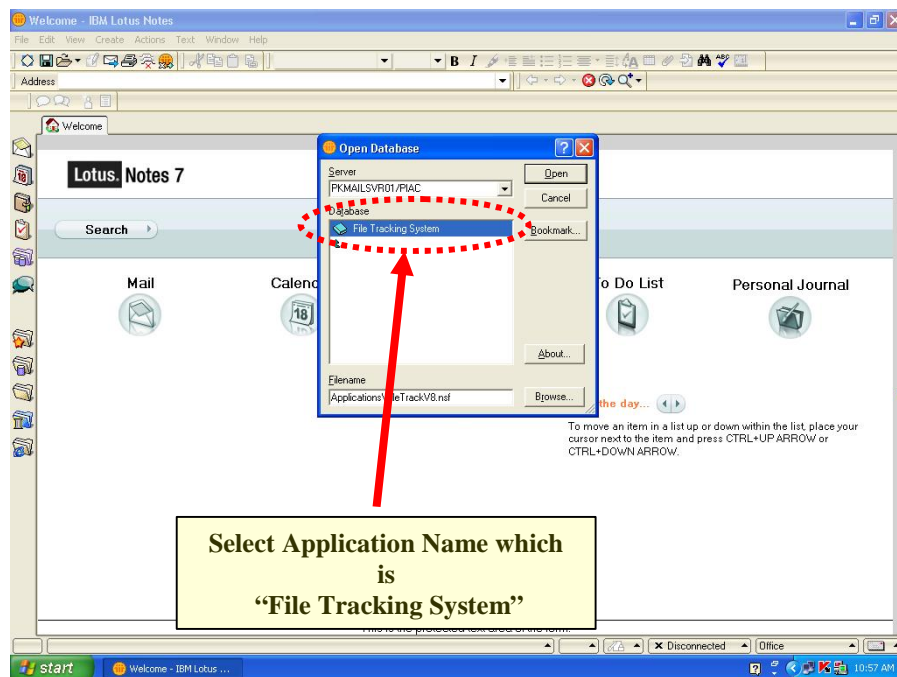
In alternate User can press shortcut key Ctrl + O also to access the next screen



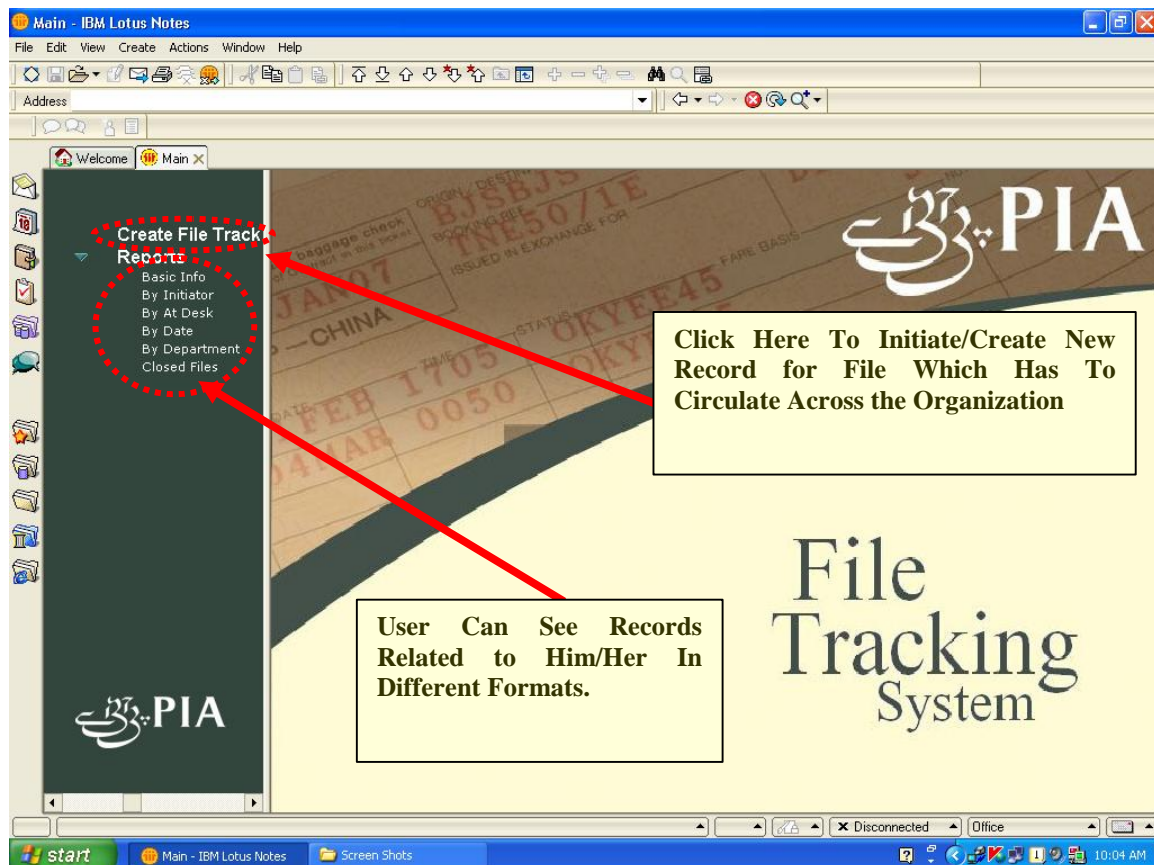
In below screen user will define following information

- Server Name
- Folder Name
- File Tracking System Application





Finally it will show the main screen of the File Tracking System.



3.0 Create File Record

3.1 Enter File Data In File Tracking System:

By click on Create File option defines in left pan user can create new record of any file which has to circulate across the organization. Following screen will appear which helps to enter data.

Save Record

Forward To Next Desk

Close Record

Login User Name

File Tracking System
File By Syed Muhammad Sher Ali/KHI/Pakistan/PIAC

Status: New

File Details

Reference No.:

Dated:

Subject:

Detail:

Priority:

Department:

Initiator:

Attachment:

Tentative Approval Cycle:

Comments:

History

New File By: Syed Muhammad Sher
Ali/KHI/Pakistan/PIAC On: 02/10/2010 10:04:37 AM

History Helps to Track the Actual Status and Position of File

The screenshot shows the 'File Tracking System' interface within an IBM Lotus Notes environment. The interface includes a 'File Details' section with the following fields and callouts:

- Subject of File Also Mandatory Field**: Points to the 'Subject' field containing 'Flight Delays'.
- Enter Reference Number Its Mandatory Field**: Points to the 'Reference No.' field containing 'DMD/LTR/01,0,Feb 17,2010'.
- Click Here to Select Date Only Current Date Will Accept**: Points to the 'Dated' field containing '02/17/2010'.
- File Detail Its Optional Field**: Points to the 'Detail' field containing 'No. of delayed flights:9'.
- Click Here to Define Priority**: Points to the 'Priority' dropdown menu set to 'Normal'.
- Click Here to Select Department**: Points to the 'Department' dropdown menu set to 'Flight Operations'.
- Record Initiator Name**: Points to the 'Initiator' field containing 'Syed Muhammad Sher Ali'.
- Comments**: Points to the 'Comments' field at the bottom.
- Click Here to Add Comments in History**: Points to the 'Add Comments' button.
- Tentative Approval Cycle**: Points to the 'Tentative Approval Cycle' field.
- If Required**: Points to the 'Attachment' field.

The interface also includes a 'History' section on the right with a 'Status View' button and a 'Comments From' section showing a comment from 'Syed Muhammad Sher Ali/KHI/Pakistan/PIAC' dated 'Feb 17'.

3.1.1 Reference Number

Reference Number is unique number of any file which is mandatory. The format of the file reference number must be standard and same as defined in PIA Corporate Quality Manual, Chapter 9 and Page 3. e.g.

DDD/EEE/# , Rev# , Date

DDD → Issuing Authority
 EEE → Document Type
 # → Sequence Number
 Rev# → Document Revision Number, for first time it can be 0
 Date → Current Date
DMD/LTR/01, 0,Feb 17, 2010

3.1.2 Date

Click on this field to select the current date which is mandatory.

3.1.3 Subject

Subject of File describes the definition of file. It is also mandatory.

3.1.4 Detail

It is an optional field which allows entering any detail related to file which can help to understand more about the definition of file.

3.1.5 Priority

Priority can be defined according to nature of file. User can select following types.

- Normal
- Urgent
- High

By default it shows Normal

3.1.6 Department

User can select the respective department from where file is being initiated. However the user can also type/add his respective department.

3.1.7 Initiator

Initiator name will appear automatically and user can't change it. Initiator name is based on the e-mail ID configured to Lotus Notes.

3.1.8 Attachment

It allows attaching any type of document which can help to support the created file information. It is an optional field.

3.1.9 Tentative Approval Cycle

Tentative Approval Cycle allows initiators/users to define the route of the file. It helps to define the next approval authority or next destination of file where it has to travel for approval.

3.1.10 Comments

Comments field allows every receiver/stake holder of file to write their comments about the file approval. All comments appear in history which helps to understand the actual status of file. After entering comments user must have to press “ADD COMMENTS” Button to add it.

Once all data is entered, there is following options mentioned below, which user can opt for further processing.

3.1.11 Save

By click on Save Button user can save record without forwarding it to next desk.

3.1.12 Forward

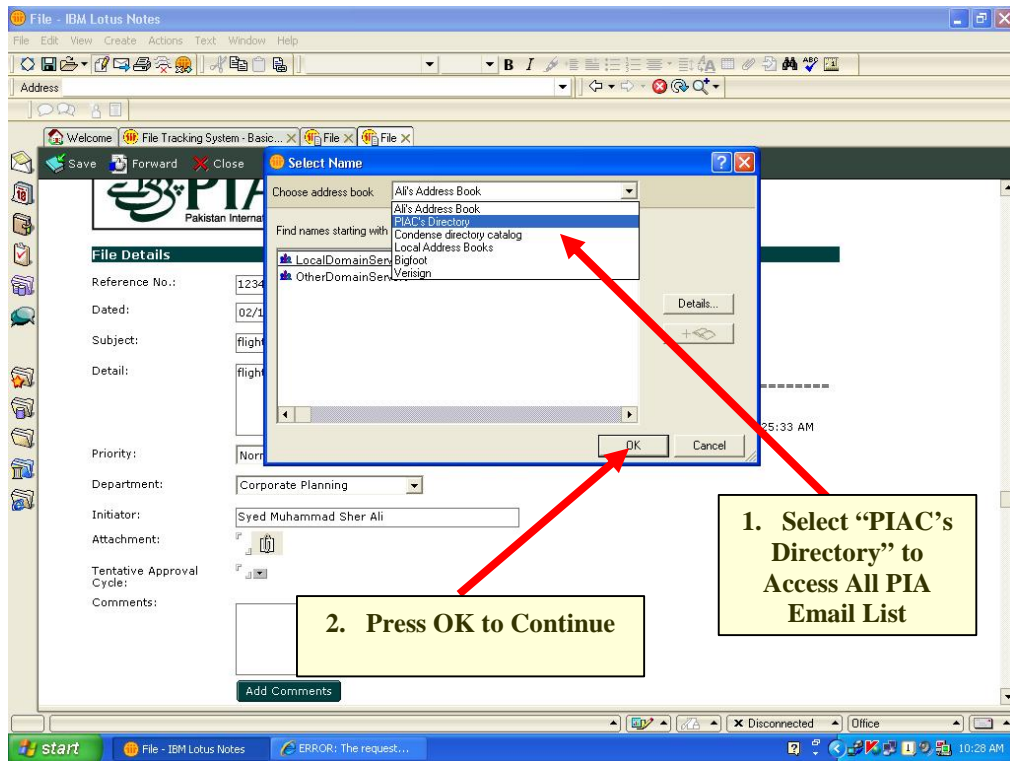
By click on Forward Button user can simultaneously forward file record to another desk and can save the same record. Following Screen will appear on “FORWARD” button

The screenshot displays the IBM Lotus Notes interface for the File Tracking System. The main window shows the details of a file being tracked. The file details include:

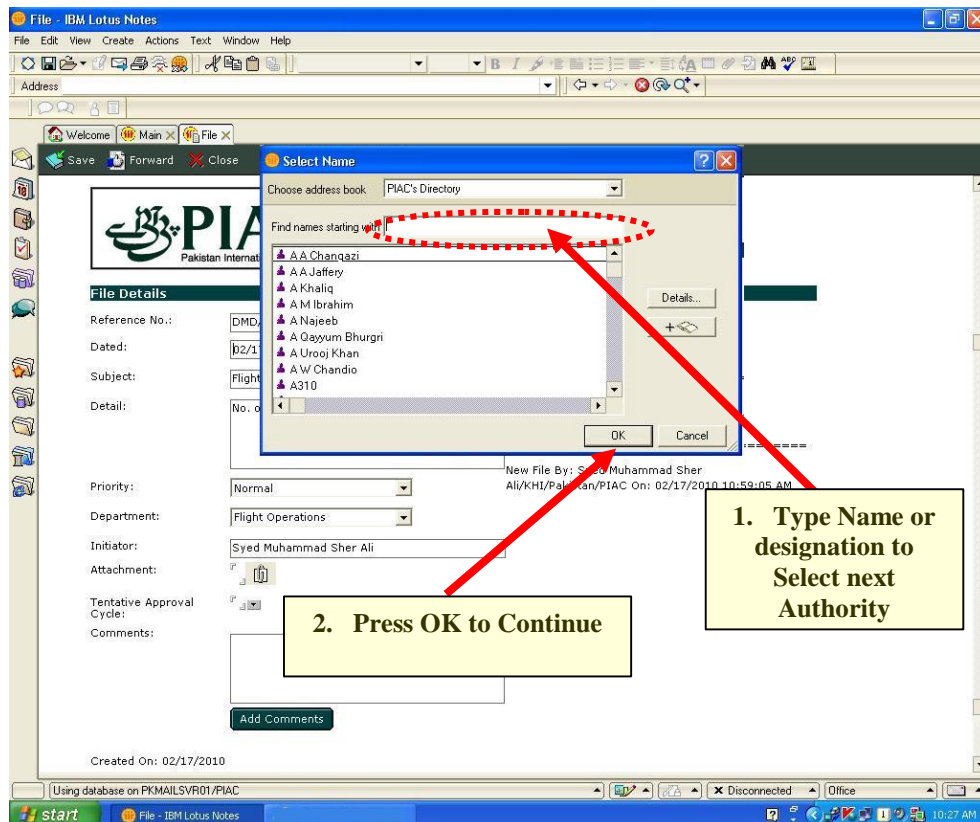
- Reference No.: DMD/LTR/01,0, Feb 17, 2010
- Dated: 02/17/2010
- Subject: Flight Delays
- Detail: No. of delayed flights: 9
- Priority: Normal
- Department: Flight Operations
- Initiator: Syed Muhammad Sher Ali
- Attachment: [Icon]
- Tentative Approval Cycle: [Icon]
- Comments: [Text Area]

The status of the file is 'New'. A modal dialog box titled 'File Tracking System' is displayed, asking 'Are you sure you want to forward this File?'. The dialog has 'Yes' and 'No' buttons. A red arrow points from a yellow callout box labeled 'Click Here to Make It Confirm' to the 'Yes' button. The background form also includes an 'Add Comments' button and a 'Created On' timestamp of 02/17/2010.

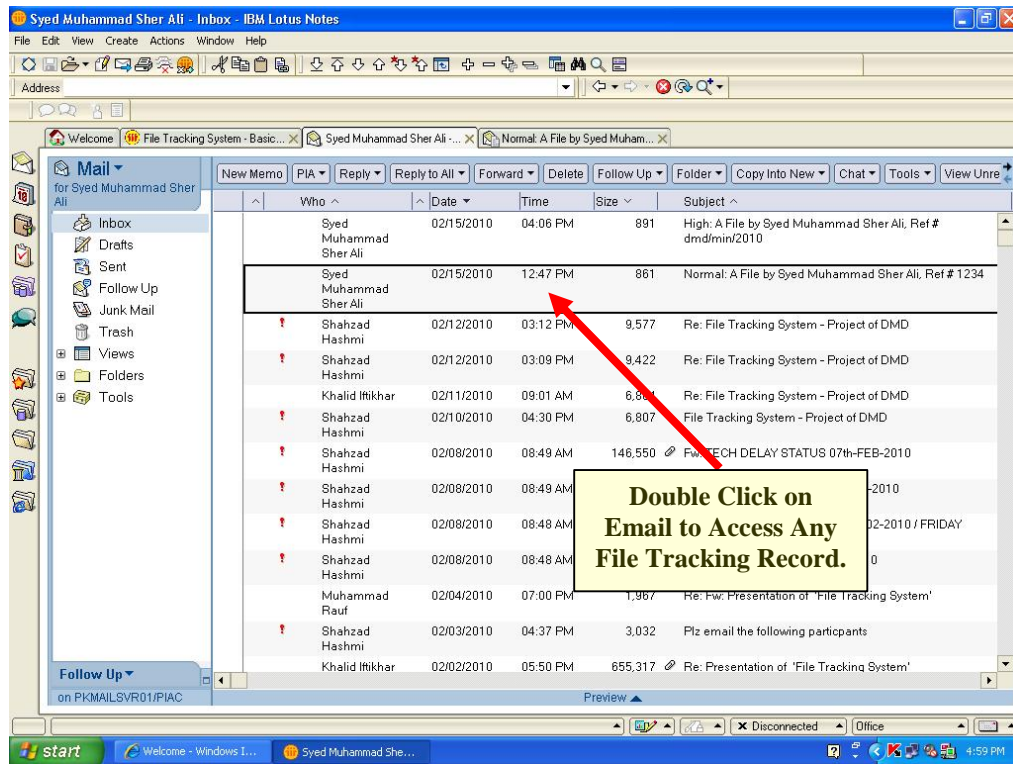
On confirmation if user presses YES, following screen will appear.



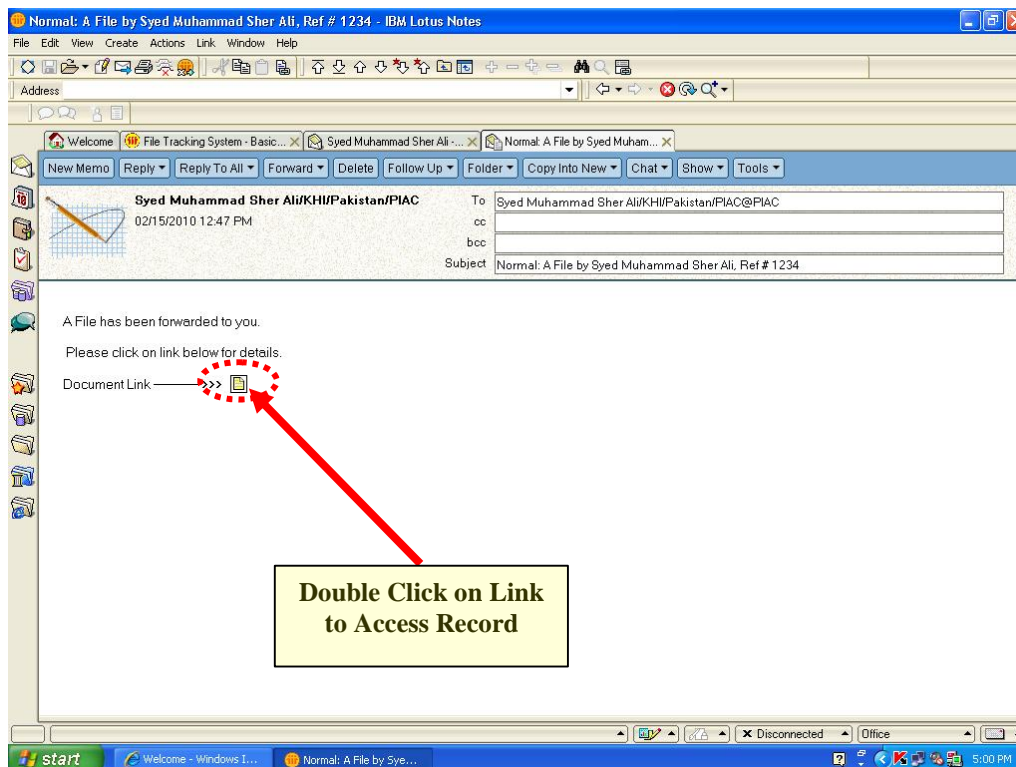
Following Screen will appear next



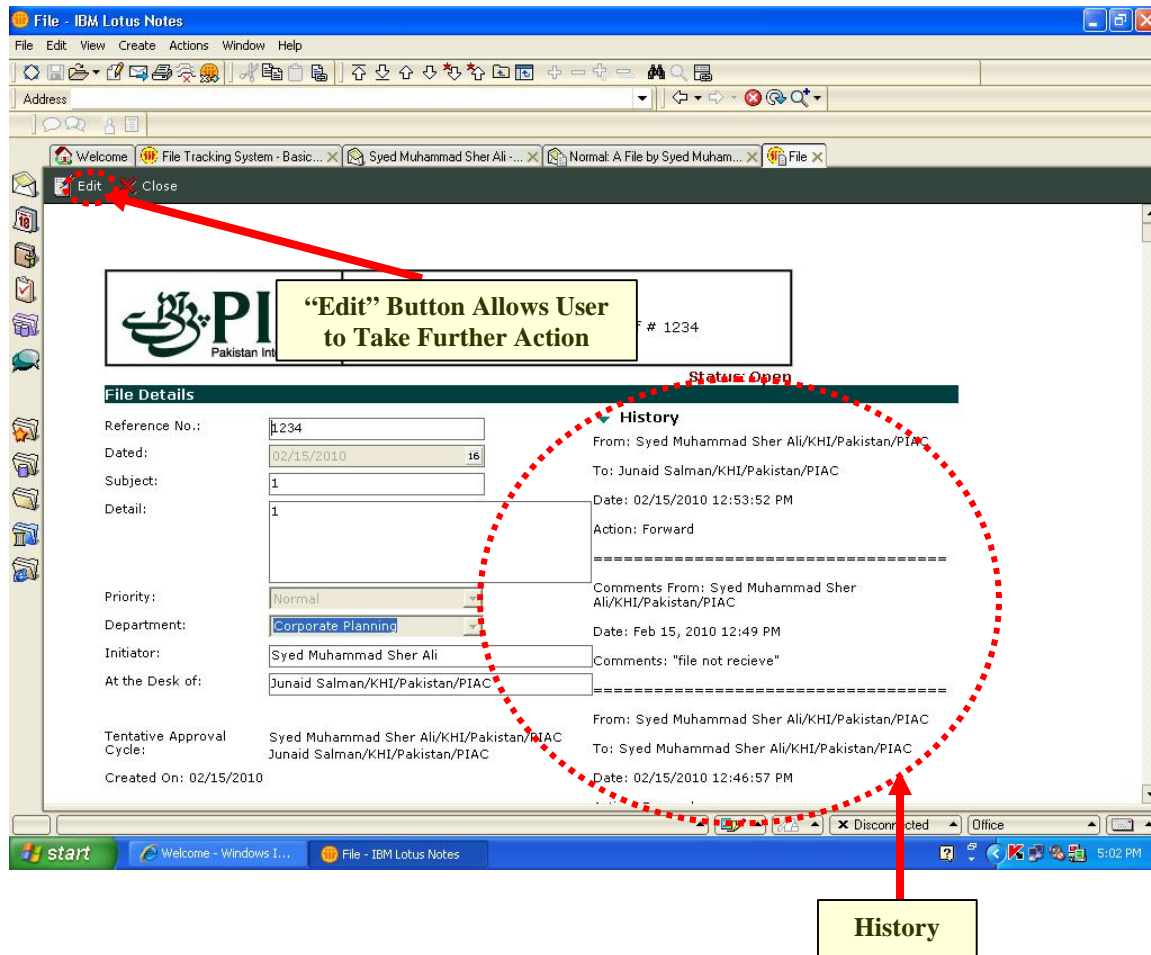
As user presses OK, it will send an email to next authority where user has forwarded the file. Following screen shows the email record for any initiated file.



On double click on email, it will be displayed like below.



Following screens show the file record opened through email link.

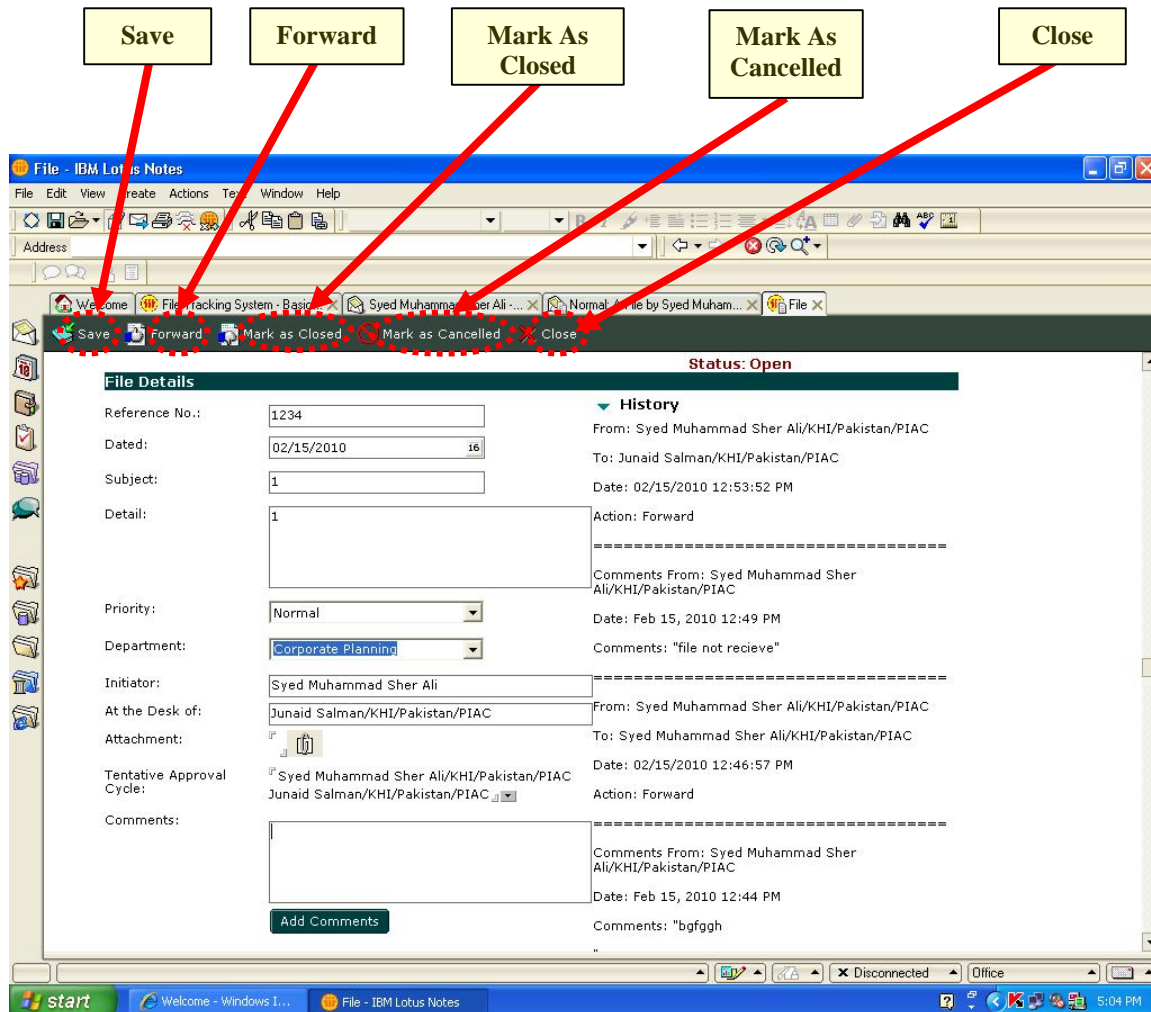


3.1.13 Edit

Edit Buttons allows user to take further action on any File. All actions taken by any authority will be appeared in “History” .

Following Screen will appear with some additional options at top of the screen which allow users to take different type of actions.

“Save” and “Forward” options are same as defined in previous pages and “Close” option simply closes the screen without making any action.



3.1.14 Mark As Closed

This option can be used if any authority thinks that the action taken by them is final and there is no further need to move the respective file to any other authority. So this option will update the file status as "Closed".

3.1.15 Mark As Cancelled

This option can be used to cancel or stop any file movement on any stage due to any reason.

4.0 Reports

4.1 Basic Info

It displays all basic information of any initiated or processed record regarding all entered files related to your department.

The screenshot displays the 'File Tracking System - Basic Info' window in Lotus Notes. The window features a menu bar (File, Edit, View, Create, Actions, Window, Help) and a toolbar with icons for search, expand, collapse, and other functions. A sidebar on the left contains a 'Create File Track Reports' menu with options: Basic Info, By Initiator, By At Desk, By Date, By Department, and Closed Files. The main area shows a table of file tracking records. The table has columns: Initiated By, At the Desk of, Days on Desk, Subject, Dated Initiated, and Current Status. The table contains several rows of data, including records for 'LocalDomainServers' and 'user1' through 'user15'. Annotations with red arrows point to various elements: 'Search' button, 'Expand All', 'Collapse All', 'Initiated By' (column header), 'Subject' (column header), 'Days on Desk' (column header), 'Dated Initiated' (column header), 'Current Status' (column header), 'Initiated By' (row data), 'At the Desk Of' (row data), 'Days on Desk' (row data), and 'Date Initiated' (row data). The bottom status bar shows 'Notes configuration settings have been refreshed', 'Disconnected', 'Office', and the time '1:57 PM'.

“Search” button can help user to search any text in report

Expand All

Collapse All

Initiated By

Subject

Days on Desk

Date Initiated

Initiated By

At the Desk Of

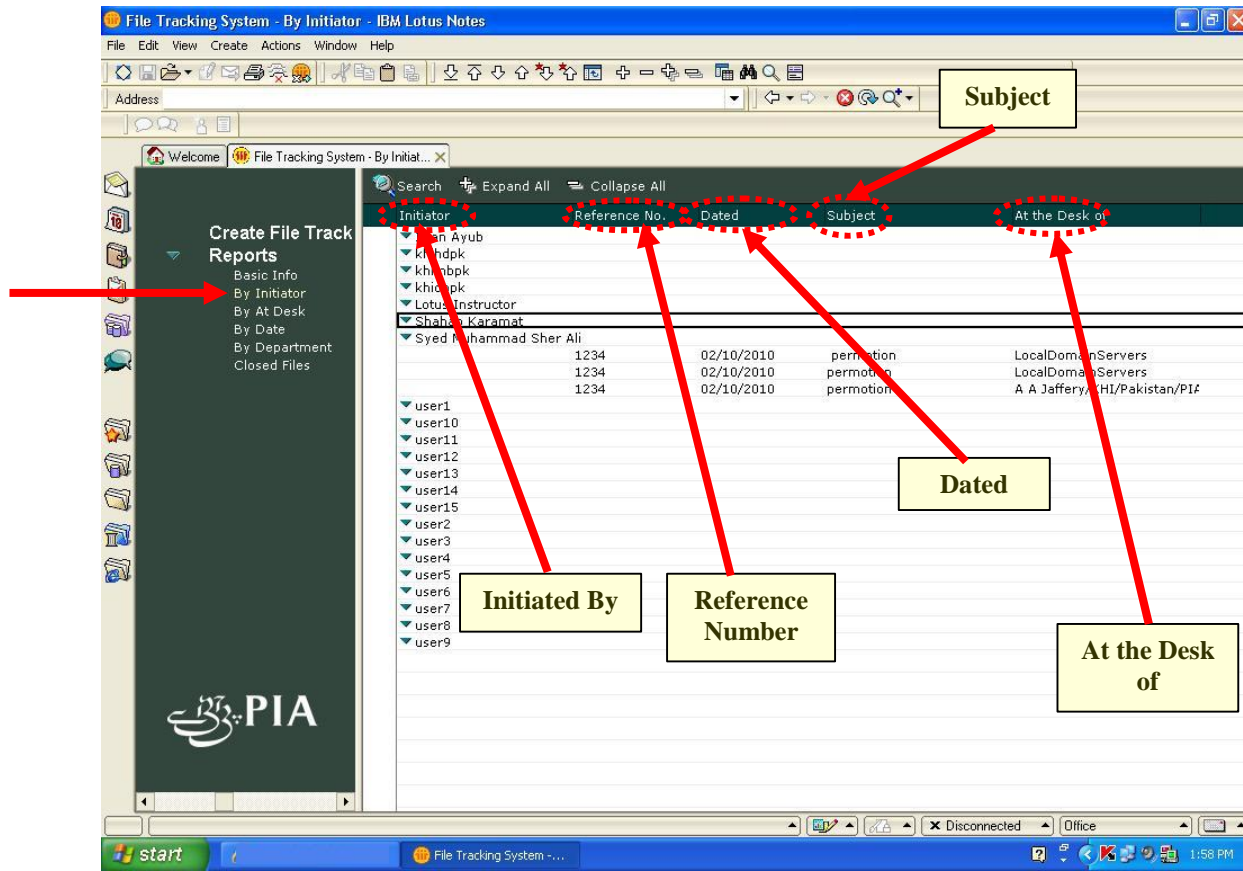
Days on Desk

Date Initiated

Initiated By	At the Desk of	Days on Desk	Subject	Dated Initiated	Current Status
khilaf					
khilaf					
khilaf					
Lotus Instructor:					
Shahab Karamat					
Syed Muhammad Sher Ali					
LocalDomainServers	1	1	permission	02/10/2010	Open
LocalDomainServers	1	1	permission	02/10/2010	Open
A A Jaffery/KHILAF/PIA 1			permission	02/10/2010	Open
user1					
user10					
user11					
user12					
user13					
user14					
user15					
user2					
user3					
user4					
user5					
user6					
user7					
user8					
user9					

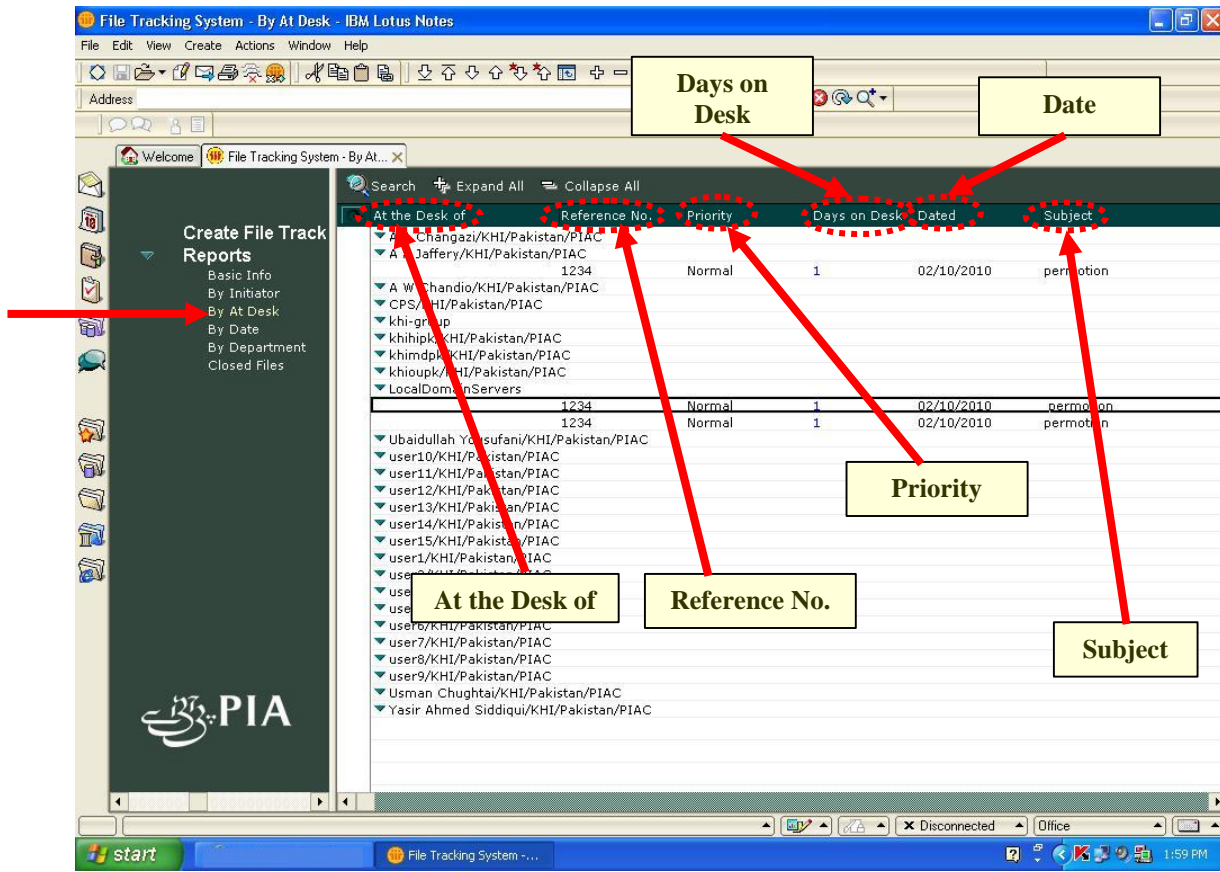
4.2 By Initiator

It shows records of all files which are initiated by your own user id.



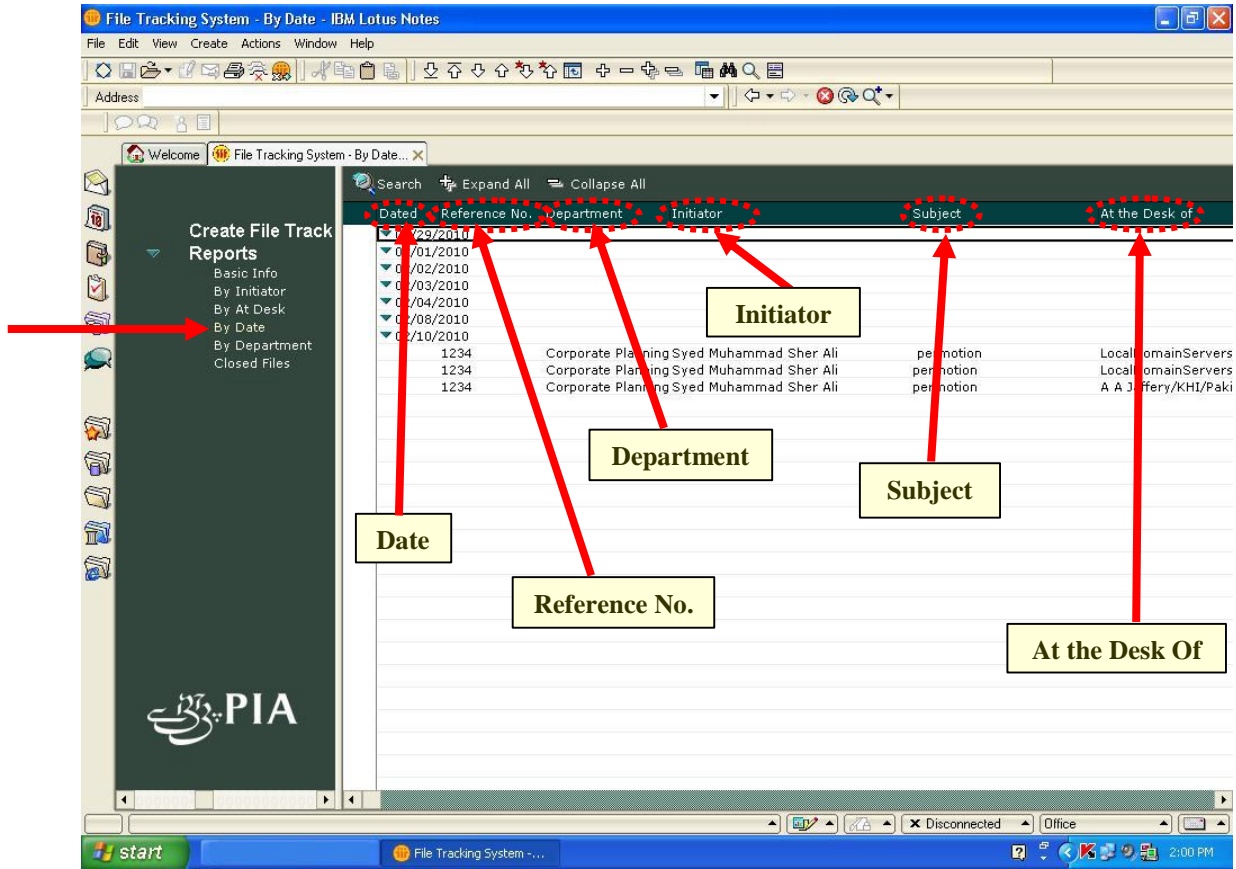
4.3 By At Desk

It shows records of all files which are at your desk.



4.4 By Date

This report will display all date wise records of files related to your department.



4.5 By Department

This report will display all department wise records. Every department can view all the files related to its department.

The screenshot displays the 'File Tracking System - By Department' report in IBM Lotus Notes. The interface includes a sidebar on the left with a tree view of departments and a main table of file tracking records. Red arrows point from labels to specific columns in the table:

- Date** points to the 'Dated' column.
- Initiator** points to the 'Initiator' column.
- Reference No.** points to the 'Reference No.' column.
- Priority** points to the 'Priority' column.
- Subject** points to the 'Subject' column.
- Status** points to the 'Status' column.
- Department** points to the 'Department' column.

The table data is as follows:

Department	Status	Reference No.	Initiator	Priority	Dated	Subject
Corporate Planning	Open	1234	Syed Muhammad Sher Ali	Normal	02/10/201	permition
Corporate Planning	Open	1234	Syed Muhammad Sher Ali	Normal	02/10/201	permition
Corporate Planning	Open	1234	Syed Muhammad Sher Ali	Normal	02/10/201	permition

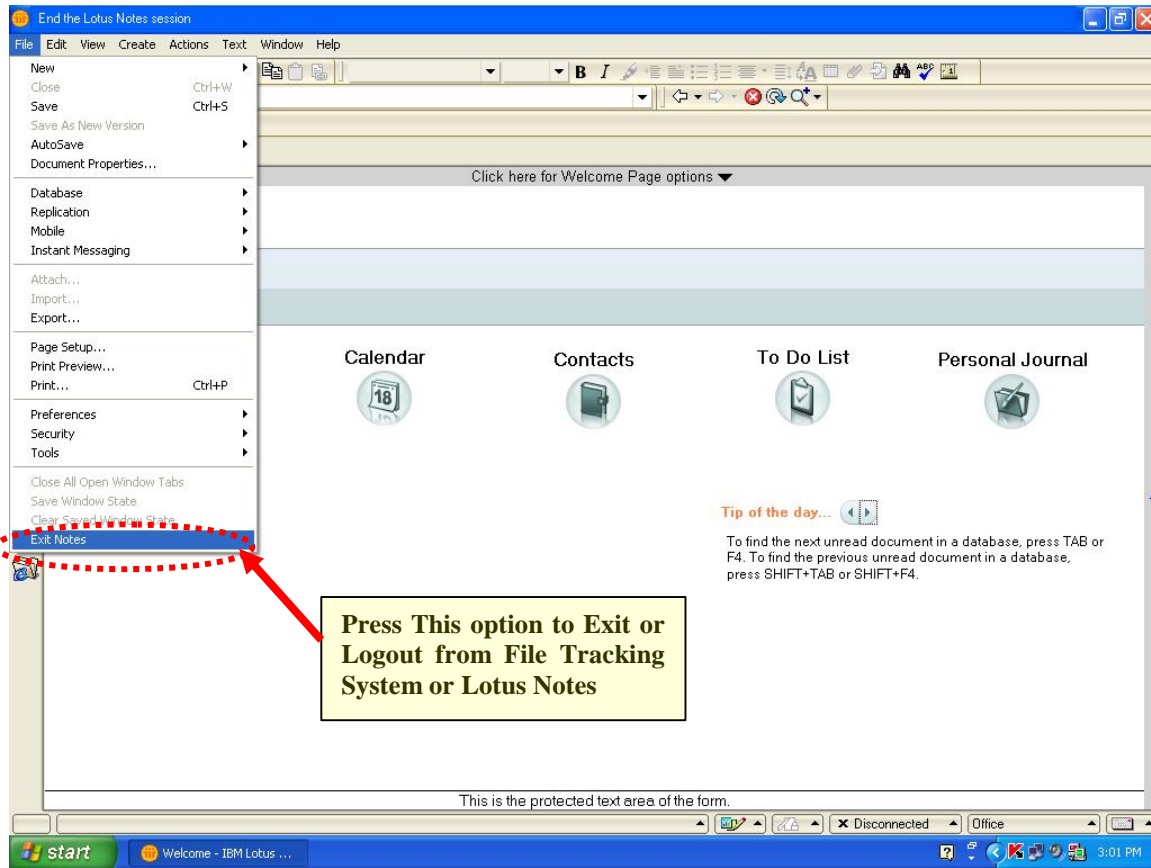
It shows the number of days for every file taken at each desk.



5.0 Sign Out

5.1 Sign Out

This option will not only close the File Tracking System but also closes Lotus Notes. For exit, simply go on “File” Option and then select “Exit Notes” to exit from this system. Following screen shows the way to Sign Out /Logout from the Lotus Notes.



6.0 Contact US

6.1 Help / Suggestion / Query

Please feel free to contact us for any Help / Suggestion / Query

<u>DMD Office</u>				
S.No	Name	Designation	Extension	Email
1	S. Shahzad Hashmi	Manager DMD Office	43841	shahzad.hashmi@piac.aero
2	Syed Sher Ali	Coordination Officer	43841	ali.sher@piac.aero
3	Junaid Salman	Management Trainee Officer	43841	junaid.salman@piac.aero
<u>Information Technology</u>				
S.No	Name	Designation	Extension	Email
1	M. Imran Khan	Assistant Manager	43534	imran.khan@piac.aero
2	Irfan Ayub	Assistant Manager	44918	irfan.ayub@piac.aero
3	Yasir Ahmed Siddiqui	IT Engineer	43533	yasir.siddiqui@piac.aero